

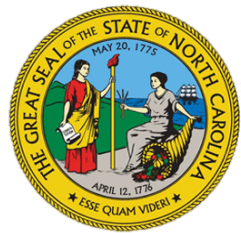
North Carolina COVID-19 Vaccine Management System (CVMS)

Provider Portal

Manage Appointment Scheduling User Guide

Version 6

May 14, 2021



NC DEPARTMENT OF
**HEALTH AND
HUMAN SERVICES**





If you have any questions, issues or requests, please go to the
CVMS Help Desk Portal* at https://ncgov.servicenowservices.com/csm_vaccine

You can also call the COVID-19 Vaccine Provider Help Center at (877) 873-6247 and select option 1. The COVID-19 Vaccine Provider Help Center is available during the following hours:

Monday – Friday: 7:00 AM – 7:00 PM ET

Saturday – Sunday: 10:00 AM – 6:00 PM ET

* On the home page of the CVMS Help Desk Portal, select the "**Vaccine Provider**" option to submit your question, issue, or request.

Providers that are first time users of the CVMS Help Desk Portal will have to follow the steps below:

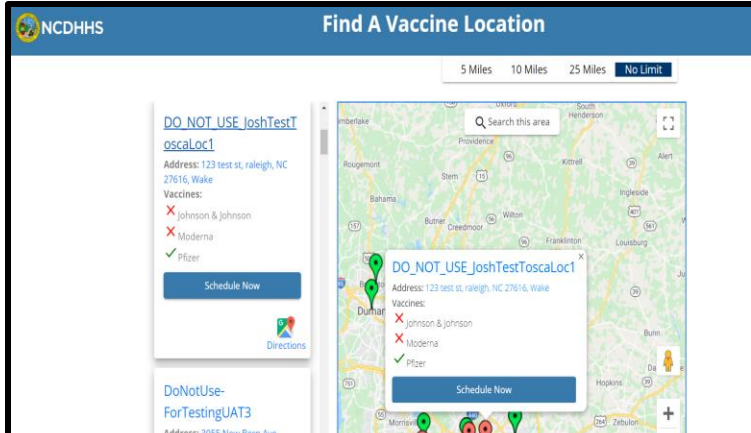
1. Register for an account on the portal by clicking 'Register' in the top right-hand corner
2. Populate your first name, last name, business e-mail, and your registration code
NOTE: The registration code is your Provider PIN (i.e., NCA650001), which can be found on the packing lists received with your Vaccines For Children shipments, or in the top right-hand corner of a wasted / expired report generated from the North Carolina Immunization Registry (please add "NCA" to the front of the six-digit PIN#)
For providers who are not enrolled or may not have a Provider PIN, you may use the following generic Provider PIN to register: VAC2021
3. You will receive an e-mail with your username and temporary password to log into the portal

Table of Contents

	Pages
Overview	4 – 7
Initial Setup of the Scheduling Feature in CVMS	8 – 24
Enable the Scheduling Feature	9 – 14
Activate Scheduling for Your Location	15 – 19
Create your Two Vaccine (Appointment) Supply Records	20 – 24
Publish Appointment slots using the Scheduling Feature in CVMS	25 – 54
Set Maximum Number of Appointments	26 – 31
Set Weekly Location Schedule for Dose 1 and Dose 2 appointments	32 – 41
Create Non-Regular Availability	42 – 46
Review Number of Appointments Booked and Remaining Quantity	47 – 50
Review Availability Report	51 – 54
Scheduling from the Perspective of a Recipient	55 – 56
Appendix	57 – 59

Overview

Overview



The scheduling feature in CVMS is optional. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment for a COVID-19 vaccine and register in CVMS altogether. You will then be able to schedule their 2nd dose appointment the day of their 1st dose appointment.

Note that these **appointments slots will be made available to the general public**. Therefore, this feature will NOT fit your needs if you vaccinate only a selected group of recipients (e.g., long-term care facility, prison).

In this user guide, we will review how to activate and use the scheduling feature in CVMS. You will be able to:

- Activate the scheduling feature in CVMS
- Publish appointments on the Vaccine Site Locator website

The processes included in this user guide are for users with the **Healthcare Location Manager profile only**.

Additionally, you will need to:

- Use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers
- Log into the CVMS Provider Portal at <https://covid-vaccine-provider-portal.ncdhhs.gov> with your NCID username and password

Now, let's get started!

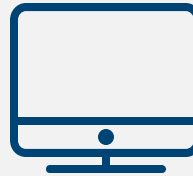
Appointment Scheduling Overview

The Appointment Scheduling process enables Healthcare Location Managers to adjust schedule availability and publish public-facing appointment slots on MySpot.nc.gov.



1

Enable scheduling for your account in the CVMS Provider Portal.



2

Once enabled, you can set up the scheduling feature for your location(s) in the CVMS Provider Portal and allow recipients to self-schedule their first-dose appointments.



3

Set your weekly availability to receive appointments.

Update the number of first-dose appointments you can receive regularly.

CVMS Scheduling Key Terms

Appointments Per Time Window	The number of concurrent appointments this location can complete per stated time window duration. Keep in mind the number of clinicians available at the time.
Available Date	This date indicates when the location appears on the Vaccine Site Locator to begin booking future appointments.
Start Date	First day the location will show available appointment slots.
Closing Date	Last day the location will show available appointment slots on the Vaccine Site Locator website.
Vaccine Supply	The Vaccine (Appointment) Supply record is the number of appointments that are made available.
Current Stock	The total number of appointments your location will offer to recipients. This should match the number of doses to cover all existing and future appointments. If no stock remains, location won't display available slots.
Date of Stock Count	Date of creation of the Vaccine Supply Record. Once created, do not edit this date.
Dose Number	Create two vaccine supply records for 1 st and 2 nd dose. Use this field to identify if this vaccine supply includes 1 st dose or 2 nd dose vaccine.


Initial Setup of the Scheduling Feature in CVMS

Enable the Scheduling Feature

Step 1 of 5: Navigate to the Locations Tab

Providers can opt-in to using the scheduling feature in CVMS.

- 1. Click on the **LOCATIONS** tab



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
Mar 10, 21, 09:47 AM	Wednesday Morning Dose 1 Scheduled	03045809	Clinic Location1
Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

View all

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Location Manager

Step 2 of 5: Begin to Enable Scheduling

1. Click the **ENABLE SCHEDULING** button



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date
Clinic 1	Clinic Org1	123 Test Dr, Vik, Iceland, North Carolina 27609 919-919-1919		
DoNotUse-FakeLocation	Clinic Org1	163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514		
TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021

Audience

Healthcare
Location Manager

Step 3 of 5: Select Provider Account

The scheduling feature in CVMS can be enabled for each provider account. Once your account has been enabled, all locations associated with that provider can begin using the scheduling feature in CVMS.

- 1. Select the provider(s) for which you want to enable the scheduling feature in CVMS
- 2. Click **NEXT**

Audience

Healthcare
Location Manager

Home Recipient Appointments Locations Bulk Registration Vaccine Inventory More

Select Accounts

Please select the PE Location that you would like to enable for CVMS Scheduling. If you do not see your PE Location from this list, then it has already been enabled with self-attestation completed.

<input type="checkbox"/>	Name	Address 1	Address 2	City	State	Zip Code	Provider PIN
<input checked="" type="checkbox"/>	Sunny Skies Clinic	1355 Springlawn ...		Raleigh	North Carolina	27609	417052

Cancel

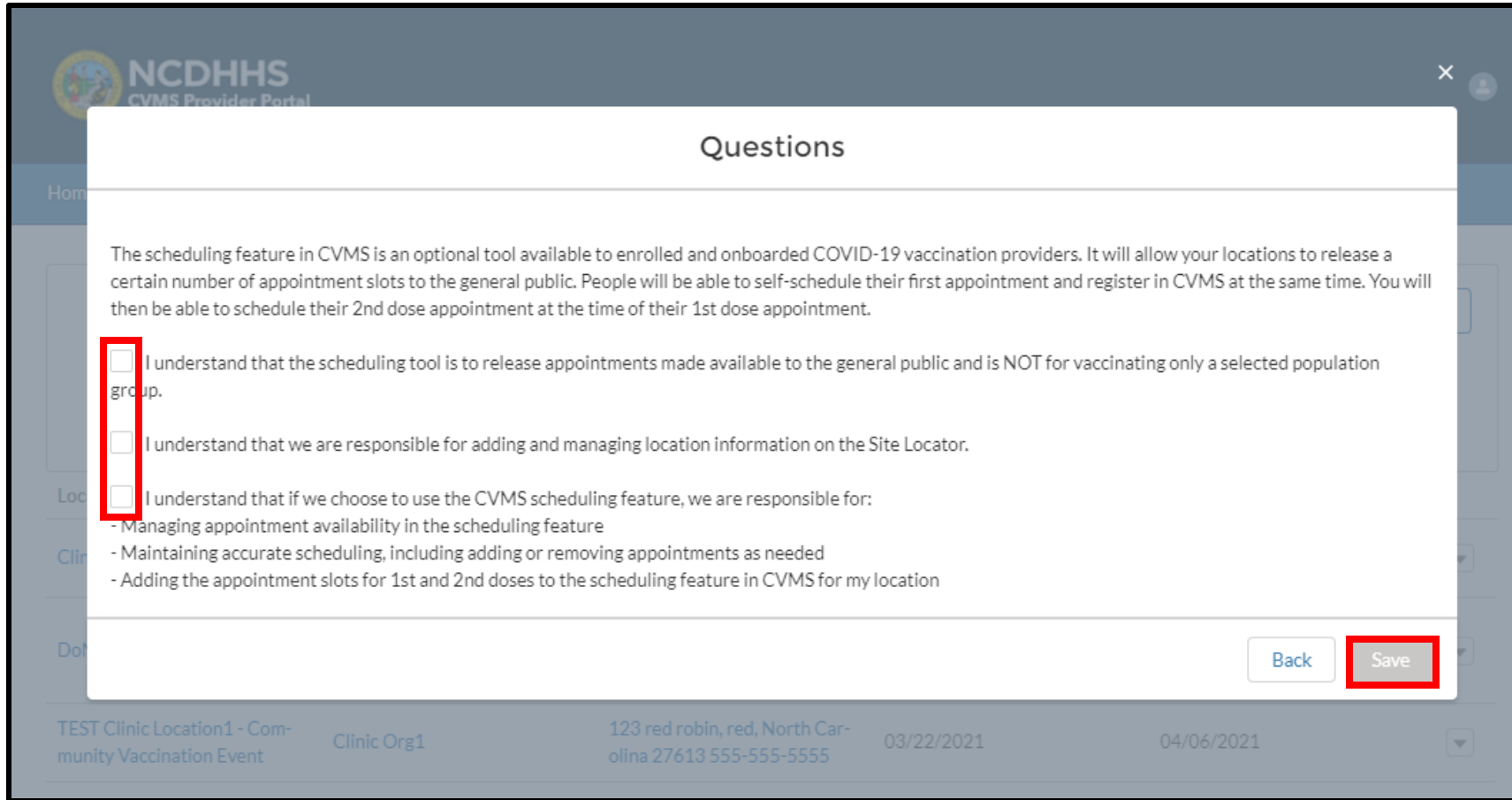
Next

DoNotUse-FakeLocation	Clinic Org1	163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514	
TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021 04/06/2021

Step 4 of 5: Review Questions

Read and review the statements. You must agree to all statements before you can enable the scheduling feature in CVMS for your location.

1. Check the checkbox attesting that you understand each statement
2. Click **SAVE**



The screenshot shows a web application interface for the NCDHHS CVMS Provider Portal. A modal dialog titled "Questions" is displayed in the center. The dialog contains a paragraph of text explaining the scheduling feature, followed by three checkboxes, each with a corresponding statement. The first checkbox is highlighted with a red square. Below the checkboxes are two buttons: "Back" and "Save", with the "Save" button also highlighted by a red square. The background of the portal shows a table with location information.

Questions

The scheduling feature in CVMS is an optional tool available to enrolled and onboarded COVID-19 vaccination providers. It will allow your locations to release a certain number of appointment slots to the general public. People will be able to self-schedule their first appointment and register in CVMS at the same time. You will then be able to schedule their 2nd dose appointment at the time of their 1st dose appointment.

☐ I understand that the scheduling tool is to release appointments made available to the general public and is NOT for vaccinating only a selected population group.

☐ I understand that we are responsible for adding and managing location information on the Site Locator.

☐ I understand that if we choose to use the CVMS scheduling feature, we are responsible for:

- Managing appointment availability in the scheduling feature
- Maintaining accurate scheduling, including adding or removing appointments as needed
- Adding the appointment slots for 1st and 2nd doses to the scheduling feature in CVMS for my location

[Back](#) [Save](#)


TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021
---	-------------	---	------------	------------

Audience


Healthcare
Location Manager

Step 5 of 5: Navigate to the Locations Tab

Congratulations! Your selected location is now enabled to use the scheduling feature in CVMS!



Success! Scheduling enabled for selected accounts



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Clinic 1	Clinic Org1	123 Test Dr, Vik, Iceland, North Carolina 27609 919-919-1919			
DoNotUse-FakeLocation	Clinic Org1	163 E Franklin St, Chapel Hill, NC 27514, Chapel Hill, North Carolina 27514			
TEST Clinic Location1 - Community Vaccination Event	Clinic Org1	123 red robin, red, North Carolina 27613 555-555-5555	03/22/2021	04/06/2021	


Audience

Healthcare
Location Manager

Activate Scheduling for Your Location

Step 1 of 4: Navigate to the Locations Tab

1. Click on the **LOCATIONS** tab



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

You are currently logged in as Clinic Location1

Switch Locations

Recipient Check-In

You can check in a recipient by entering their appointment confirmation number into the box below

Appointment Confirmation Number

Go

No Appointment Confirmation Number?

Search Appointments

Today's Appointments

TIME	DETAILS	CASE NUMBER	LOCATION
Mar 10, 21, 08:00 AM	TJ TJ Dose 1 Scheduled	03045802	Clinic Location1
Mar 10, 21, 09:47 AM	Wednesday Morning Dose 1 Scheduled	03045809	Clinic Location1
Mar 10, 21, 09:57 AM	Jennifer Yu Dose 2 Scheduled	03045108	Clinic Location1
Mar 10, 21, 10:46 AM	Tar Ramses Heels Dose 1 Scheduled	03045812	Clinic Location1
Mar 10, 21, 10:48 AM	Buzz Fred Lightyear Dose 1 Scheduled	03045814	Clinic Location1

View all

Appointment Walk-In


You can search for eligible individuals by name, date of birth and email. Note that the system will search on exact matches only, no partial.

Audience

Healthcare
Location Manager

Step 2 of 4: Select the Location

1. Click on the **LOCATION NAME** for which you wish to enable the scheduling feature in CVMS



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More ▾

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name ▾	Account ▾	Address ▾	Start Date	Closing Date	
Clinic Location1	Clinic Org1	1204 SCHOOL ST, WILKES-BORO, North Carolina 28697	04/07/2021		▾
Sunny Skies Clinic	Sunny Skies Clinic	1355 Springlawn Ct, Raleigh, North Carolina 27609 919-919-0000	04/13/2021		▾
123 Test Dr. Raleigh, North					

Audience

Healthcare
Location Manager

Tips

You can choose to enable the scheduling feature in CVMS for some or all your locations.

Step 3 of 4: Edit your Location Record

Navigating to the Details tab allows you to view and edit location details.

- 1. Click **EDIT**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Sunny Skies Clinic

Edit

Details

Related

Availability

Location Name

Sunny Skies Clinic

Event Type

Not Applicable

Scheduling Information

Display on Vaccine Site Locator

No

Appointment Phone

Available Vaccine Brands

Brand Override

Address

Street Address

1355 Springlawn Ct

City

Raleigh

State

North Carolina

Created By

Kevin Kauffman , 4/13/2021, 10:38 AM

Account

Sunny Skies Clinic

Location Setting

Default

CVMS Scheduling

Appointment Scheduling Website

https://

Street Address 2

County

Wake

Postal Code

27609

Last Modified By

Kevin Kauffman , 4/13/2021, 10:38 AM

Audience

Healthcare
Location Manager

Tips

Locations will be displayed on the Vaccine Site Locator website <https://MySpot.nc.gov> if the Display on Vaccine Site Locator field is set to **YES** and if the Location Setting field is set to **DEFAULT**.

Step 4 of 4: Activate the Scheduling Feature of CVMS for your Location

- 1. Check the **CVMS SCHEDULING** box
- 2. Click **Save**

Edit Sunny Skies Clinic

Location Name

Sunny Skies Clinic

Account

Sunny Skies Clinic

Event Type

Not Applicable

Location Setting

Default

Scheduling Information

Display on Vaccine Site Locator

Yes

Appointment Phone

919-919-0000

Appointment Scheduling Website

CVMS Scheduling

☒

Available Vaccine Brands

Available

Chosen

Moderna US, Inc.

Pfizer-BioNtech

Janssen Products, LP

Brand Override

☒

Address

Street Address

1355 Springlawn Ct

Street Address 2

City

Raleigh

County

Wake

State

North Carolina

Postal Code

27609

Created By

Last Modified By

Cancel

Save & New

Save

Audience

Healthcare
Location Manager

Tips

Both **CVMS Scheduling** and **Display on Vaccine Site Locator** should be checked to allow recipients to find your site and book appointments.

Create your Two Vaccine Supply Records

Step 1 of 8: Choose Location


The scheduling feature in CVMS requires you to maintain two vaccine (appointment) supply records: one record for the first-dose appointments and a second record for the second-dose appointments (even for 1 dose vaccines).

However, once created, you will just need to maintain the first-dose appointment vaccine supply record if you follow these instructions.

- 1. Navigate to the **LOCATIONS** tab
- 2. Click on the location name hyperlink

Audience

Healthcare
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Filter by Name

Filter by Address

Filter by Start Date

Filter by End Date

Location Name

Account

Address

Start Date

Closing Date

Clinic Location1

Clinic Location1

Test Street, Raleigh, North Carolina 20175

03/10/2021

03/31/2021

← Previous

Page 1 out of 1

Next →

Step 2 of 8: Click ‘New’ to Create your Two Vaccine Supply Records

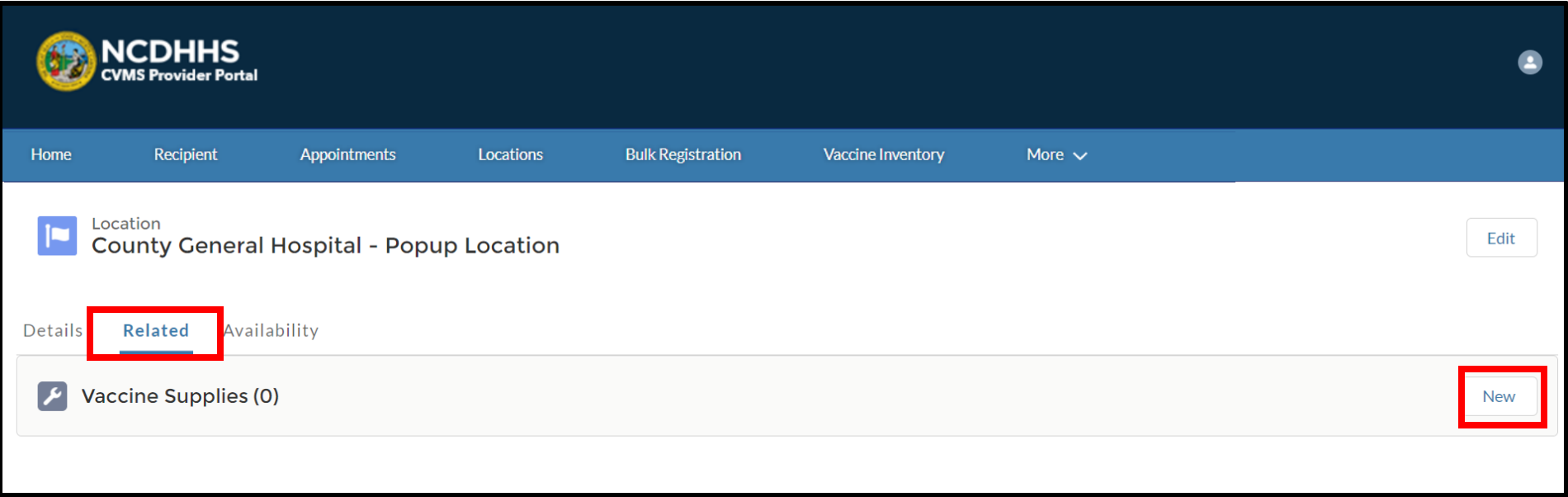
- 1. Click the **RELATED** tab
- 2. Click **NEW**

Audience

Healthcare
Location Manager

Tips

If you already have created your two vaccine supply records, edit the existing record and do not create a new one.



Step 3 of 8: Create your 1st Dose Vaccine Supply Record

A **NEW VACCINE SUPPLY** pop-up window will appear.

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**
2. In **CURRENT STOCK** enter the number of appointment slots you wish to release
Note: If you do not know how many appointment slots to release yet, enter 0
3. Select today's date for **DATE OF STOCK COUNT**
4. In **DOSE NUMBER**, select **1**
5. Click **SAVE & NEW**

The screenshot shows a 'New Vaccine Supply' window. The 'Information' section is highlighted with a red rectangle. It contains the following fields:

- Name:** (empty)
- Location:** Sunny Skies Clinic
- Vaccine:** VAX-0000
- Dose Number:** 1
- Current Stock:** 1,000
- Date of Stock Count:** 3/22/2021

The 'System Information' section shows the Owner as Kevin Kauffman. At the bottom are buttons for 'Cancel', 'Save & New', and 'Save'.

Audience

Healthcare
Location Manager

Tips

Vaccine Supply in this instance means "Appointment" Supply.

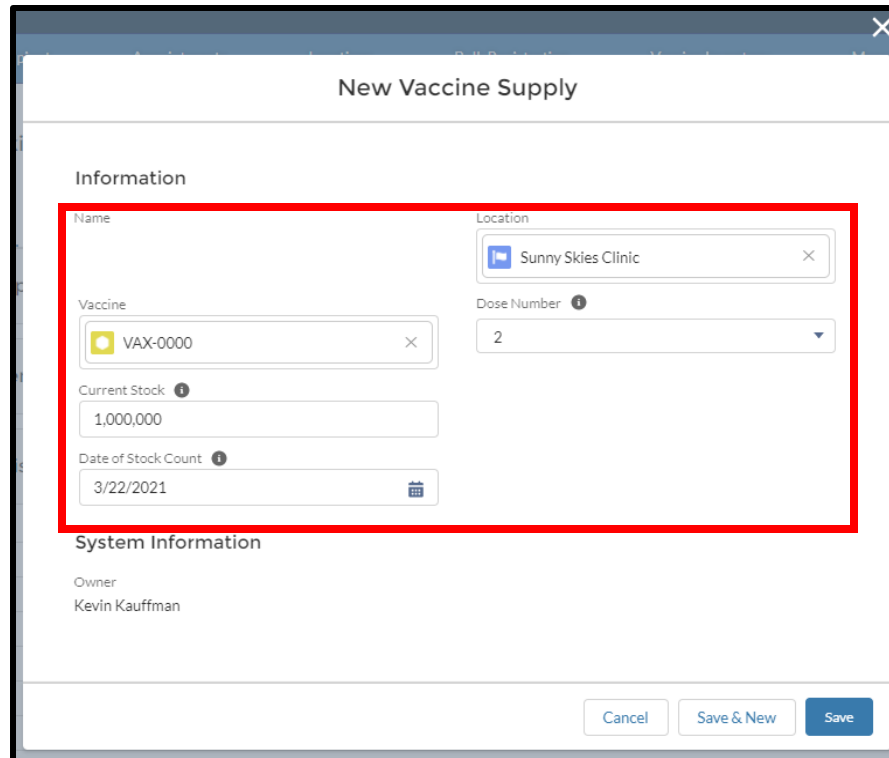
Set Current Stock to equal the number of first-dose appointments you want to make available for that location between the **START DATE** and **CLOSING DATE**.

Step 4 of 8: Create Unlimited Record 2nd dose Appointments

1. In the **VACCINE** field, select the generic vaccine record **VAX-0000**
2. In **CURRENT STOCK** enter a random large number of appointments (e.g., 1,000,000)

Note: When recipients have received for their first-dose appointment, you will be able to schedule their second-dose appointment (if applicable). Therefore, we do not need to maintain the number of second-dose appointments to be released in the system because this number cannot exceed your number of scheduled first-dose appointments.

3. Select today's date for **DATE OF STOCK COUNT**
4. In **DOSE NUMBER**, select **2**
5. Click **SAVE**



The screenshot shows a web application window titled "New Vaccine Supply". The "Information" section is highlighted with a red rectangle. It contains the following fields:

- Name:** Sunny Skies Clinic
- Vaccine:** VAX-0000
- Location:** Sunny Skies Clinic
- Dose Number:** 2
- Current Stock:** 1,000,000
- Date of Stock Count:** 3/22/2021

Below the "Information" section is the "System Information" section, which shows the owner as Kevin Kauffman. At the bottom of the form are three buttons: "Cancel", "Save & New", and "Save".

Audience

Healthcare
Location Manager

Tips

You will not need to maintain this record once created if you make the 2nd Dose Vaccine Supply Current Stock very large.

Publish Appointment slots using the Scheduling Feature in CVMS

Set Maximum Number of Appointments

Setting Vaccine Supply




“Vaccine (Appointment) Supply” is what sets the total number of first dose appointments available

- Set 1st dose Vaccine Supply to equal the number of 1st dose appointments you want to make available for that location
- It does NOT need to be the same as your total inventory on hand.
 - If you need to hold back doses (e.g., set aside for a planned event, Historically Marginalized Population outreach), do not include those in the “Vaccine Supply”
- You should only release the number of First-Dose appointments you are able to cover with your doses

Step 1 of 4: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

← Previous

Page 4 out of 4

Next →

Audience

Healthcare
Location Manager

Step 2 of 4: Select your 1st Dose Vaccine Supply Record


- 1. Click on **RELATED**
- 2. Click on the **DOSE 1 VACCINE SUPPLY** record name

Audience

Healthcare
Location Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Clinic Location1 - Community Vaccination Event

Edit

Details

Related

Availability

Vaccine Supplies (2)

New

Name	Current Stock	Vaccine Brand	Dose Number
<div>SUP-00055</div>	1,000	Generic	1
<div>SUP-00056</div>	1,000,000	Generic	2


View All

Step 3 of 4: Edit your 1st Dose Vaccine Supply Record

- 1. Click on the **EDIT** button

Audience

Healthcare
Location Manager



Home

Recipient


Appointments

Locations

Bulk Registration

Vaccine Inventory

More ▾

 Vaccine Supply
SUP-00052

Clone

Edit

DETAILS

RELATED

Name

SUP-00052

Vaccine

Current Stock

800

Date of Stock Count

3/11/2021

Location

[County General Hospital - Popup Location](#)

Vaccine Brand

Dose Number

1

Step 4 of 4: Add new appointments to the Number of 1st Dose Appointments Offered

1. Increase the **CURRENT STOCK** amount to allow new 1st dose appointments to be offered

Note: Each appointment scheduled by a recipient will reduce the remaining number of appointments. Therefore, add to the current stock to allow for additional appointments.

For example, if you wish to allow 100 additional appointments and the current stock is set at 900, update the Current Stock field to show 1,000.

2. Click **SAVE**

The screenshot displays the NCDHHS CVMS Provider Portal interface. The main navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and More. The left sidebar shows the 'Vaccine Supply' section with details for SUP-00055, including its name, vaccine (VAX-0002), current stock (1,000), and date of stock count (3/22/2021). The main content area shows the 'Edit SUP-00055' form. The 'Current Stock' field is highlighted with a red box and contains the value '1,000'. The 'Save' button at the bottom right is also highlighted with a red box.

Audience

Healthcare
Location Manager

Tips

There is no correlation between Inventory and Vaccine (Appointment) Supply in CVMS. You need to be aware of your vaccine inventory and upcoming allocations to avoid over booking appointments and to track 1st and 2nd doses.


The change takes effect immediately, so this number should only be increased when the location has the supply to support additional appointments.

Set Weekly Location Schedule for Dose 1 and Dose 2 appointments

Step 1 of 9: Navigate to the Location

Set the weekly schedule to share your available times to receive vaccine appointments. Note the same weekly schedule will be used to book 1st and 2nd dose appointments (if applicable). To begin, you must navigate to the location.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

← Previous

Page 4 out of 4

Next →

Audience

Healthcare
Location Manager

Step 2 of 9: Set the Dates for which Recipients can Book a First-Dose Appointment

First dose appointment slots will be available for recipients to book appointments between the **START DATE** and **CLOSING DATE** for a location.

1. Click on the **DETAILS** tab
2. Click Edit
3. Enter the location **START DATE**
4. Enter the location **CLOSING DATE**

Edit Kevin's Pharmacy

919-919-9191

Available Vaccine Brands

Available: Pfizer-BioNtech

Chosen: Janssen Products, LP, Moderna US, Inc.

Available Date: 5/12/2021

Start Date: 5/24/2021

Closing Date: 6/7/2021

Address

Street Address: 6611 Lake Hill Dr

Street Address 2:

Buttons: Cancel, Save & New, Save

Audience

Healthcare
Location Manager

Tips

You may regularly edit the **CLOSING DATE** to extend it as you receive more **VACCINE INVENTORY**.

Second dose appointments will be available for booking by you to schedule appointments for recipients after the minimum period between 2 doses (if applicable). See the Addendum for CVMS Scheduling Feature User Guide for additional instructions at

<https://covid19.ncdhhs.gov/addendum-scheduling-feature-point-care-and-vaccine-administration-user-guide/download>.

Step 3 of 9: Enter Available Date

The **AVAILABLE DATE** indicates when available appointment slots will be offered to recipients. By having the available date before the start date, It will allow recipients to start scheduling appointments in advance.

- 1. Enter **AVAILABLE DATE**
- 2. Click **SAVE**

Audience

Healthcare
Location Manager

Edit Kevin's Pharmacy

919-919-9191

Available Vaccine Brands

Available: Pfizer-BioNtech

Chosen: Janssen Products, LP
Moderna US, Inc.

Available Date: 5/12/2021

Start Date: 5/24/2021

Closing Date: 6/7/2021

Address

Street Address: 6611 Lake Hill Dr


Street Address 2:

Buttons: Cancel, Save & New, Save

Step 4 of 9: Open the Availability tab

The default vaccination schedule for a location is created and managed on the **AVAILABILITY TAB**.

- 1. Click on the **AVAILABILITY TAB**



[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window
<input type="checkbox"/> MON	Unavailable		
<input type="checkbox"/> TUE	Unavailable		

Audience

Healthcare
Location Manager

Tips

All previously scheduled appointments will be unaffected by updates to the vaccination schedule.

Step 5 of 9: Select Opening Days

A location will set weekly time to administer vaccinations from its **START DATE** to its **CLOSING DATE** for first dose appointments and second dose appointments.

- 1. Check the checkbox for each day you will administer vaccinations at this location (Monday through Sunday)

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours			Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	12:00 AM	12:00 PM	<input type="checkbox"/> All day	0	0	Actions
<input checked="" type="checkbox"/> TUE	12:00 AM	12:00 AM	<input type="checkbox"/> All day	0	0	Actions

Audience

Healthcare
Location Manager

Tips

Unselected days will not be open to appointments.

Step 6 of 9: Set Opening Hours

For each open day you will need to set the **OPENING HOURS** per time window. You can have multiple time windows within the same day. To add another time window, click on the **ACTIONS** on the right and select **ADD TIME**.

- 1. Enter the **OPENING HOURS**

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours		Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div>08:00 AM</div> <div>12:00 PM</div> <div>12:00 PM</div> <div>02:00 PM</div>	<input type="checkbox"/> All day	<div></div> <div></div>	<div></div> <div></div>	<div>Actions</div> <div>Actions</div> <div>Add time</div> <div>Remove</div>
<input type="checkbox"/> TUE	Unavailable				

Audience

Healthcare
Location Manager

Tips

Do not check the **ALL DAY** checkbox as this will allow appointments to be scheduled over a 24-hour period.

You may not enter a time twice on the same day (e.g., a time window on Monday from 8 AM to 6 PM and another time window on Monday from 8 AM to 11 AM).

Step 7 of 9: Enter Time Window Duration

The **TIME WINDOW DURATION (MIN)** is the length of time it takes for a single vaccinator to administer a vaccination (typically 5 to 15 minutes). Appointments will be created at evenly spaced intervals throughout the **OPENING HOURS** at the location. If the **OPENING HOURS** require a unique **TIME WINDOW DURATION**, you must add another opening hours.

- 1. Enter the **TIME WINDOW DURATION (MIN)** applicable for the entire schedule at this location

Audience

Healthcare
Location Manager

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div>08:00 AM</div> <div>12:00 PM</div> <div>12:00 PM</div> <div>02:00 PM</div>	<div>15</div> <div>15</div>	<div></div> <div></div>	<div>Actions</div> <div>Actions</div>
<input type="checkbox"/> TUE	Unavailable			
<input type="checkbox"/> WED	Unavailable			

Step 8 of 9: Enter Appointments Per Time Window

Appointments per time window is the number of people you can vaccinate at the same time. If the **OPENING HOURS** require a unique **APPOINTMENTS PER TIME WINDOW**, you must add another opening hours.

- 1. Enter the **APPOINTMENTS PER TIME WINDOW**

Audience

Healthcare
Location Manager

[Home](#) [Recipient](#) [Appointments](#) [Locations](#) [Bulk Registration](#) [Vaccine Inventory](#) [More](#)

Location

Kevin's Pharmacy

Edit

Details

Related

Availability

Default hours

Set your locations default opening hours and capacity. These are used to display the opening times of your location on search results.

Day	Opening hours	Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	<div>08:00 AM</div> <div>12:00 PM</div> <div>All day</div>	<div>15</div> <div>15</div>	<div>6</div> <div>3</div>	<div>Actions</div> <div>Actions</div>
<input type="checkbox"/> TUE	Unavailable			
<input type="checkbox"/> WED	Unavailable			

Step 9 of 9: Finalize Schedule

You have now created a default schedule for your location.

- 1. **REVIEW** the schedule for the location
- 2. Click **SAVE**

Congratulations! You have now finalized the default schedule for your location!

Day	Opening hours		Time window duration (mins)	Appointments per time window	
<input checked="" type="checkbox"/> MON	08:00 AM ▾ 12:00 PM ▾	<input type="checkbox"/> All day	15 15	6 3	Actions ▾ Actions ▾
<input type="checkbox"/> TUE	Unavailable				
<input type="checkbox"/> WED	Unavailable				
<input type="checkbox"/> THU	Unavailable				
<input type="checkbox"/> FRI	Unavailable				
<input type="checkbox"/> SAT	Unavailable				
<input type="checkbox"/> SUN	Unavailable				

Cancel Save

Audience

Healthcare
Location Manager

Tips

The schedule determines the number of appointment slots. For an appointment to be made, there must be an open appointment slot and available vaccine (appointment) supply.

Create Non-Regular Availability


Step 1 of 4: Navigate to the Location

Set a non-regular availability schedule to create a schedule when your location does not follow the default schedule availability in the case of holiday closure, reduced hours, large vaccination event, or more.

- 1. Click on the **LOCATION TAB**
- 2. Click on the **LOCATION NAME** hyperlink

Audience

Healthcare
Location Manager



NCDHHS
CVMS Provider Portal

Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

New

Enable Scheduling

Filter by Name

Filter by Address

Filter by Start Date

Filter by Closing Date

Location Name	Account	Address	Start Date	Closing Date	
Training Team Vaccine Provider - Site 1	Training Team Vaccine Provider - Site 1	1332 Turner Woods Drive, Raleigh, North Carolina 27603 9196000979	05/13/2021	05/31/2021	
Training Team Vaccine Provider - Location Site 2	Training Team Vaccine Provider - Site 2	123 Test Dr, Raleigh, North Carolina 27609 919-919-9191	05/17/2021	05/21/2021	
Kevin's Pharmacy	TestLoc_UAT1	6611 Lake Hill Dr, Raleigh, North Carolina 27609 919-919-9191	05/31/2021	06/11/2021	

Previous

Page 4 out of 4

Next

Step 2 of 4: Open the Availability tab

Non-regular availability is set on the Availability tab. The default schedule is at the top. If the location does not follow this schedule, create an **AVAILABILITY OVERRIDE**.

- 1. Click on the **AVAILABILITY TAB**
- 2. Scroll-down to the bottom of the page, and click the **NEW AVAILABILITY OVERRIDE** button

☐ THU

Unavailable

☐ FRI

Unavailable

☐ SAT

Unavailable

☐ SUN

Unavailable

Cancel

Save

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

New availability override

Audience

Healthcare
Location Manager

Tips

A location can have up to 10 **AVAILABILITY OVERRIDES**.

Step 3 of 4: Set Override Dates

The Availability Override schedule will override the default schedule availability between the dates that you set.

- 1. Set the beginning of the Availability Override in the **FROM** field
- 2. Set the end of the Availability Override in the **UP TO AND INCLUDING** field

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions

Select the date range you want to override

From

Up to and including

2021-05-31

2021-05-31

No end date, run ongoing

Weekly pattern

Day	Opening hours	Time window duration (mins)	Appointments per time window
<div>MON</div>	Unavailable		
<div>TUE</div>	Unavailable		
<div>WED</div>	Unavailable		


Audience

Healthcare
Location Manager

Tips

For a single day closure, select the same date in the two date fields FROM and UP TO AND INCLUDING.

If the override does not currently have an end date, select the No end date, run ongoing checkbox

 NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

45

Step 4 of 4: Set Availability Schedule for Override Dates

Create the override availability schedule for the location. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on creating an availability schedule. Note, this schedule will only apply to the location between the availability override dates.

- 1. Set your override availability schedule
- 2. Click **SAVE**

Audience

Healthcare
Location Manager

Availability overrides

Override your default hours and capacity for a period of time. A maximum of 10 overrides can be active at once.

Actions

Select the date range you want to override

From

Up to and including

2021-05-31

2021-05-31

No end date, run ongoing

Weekly pattern

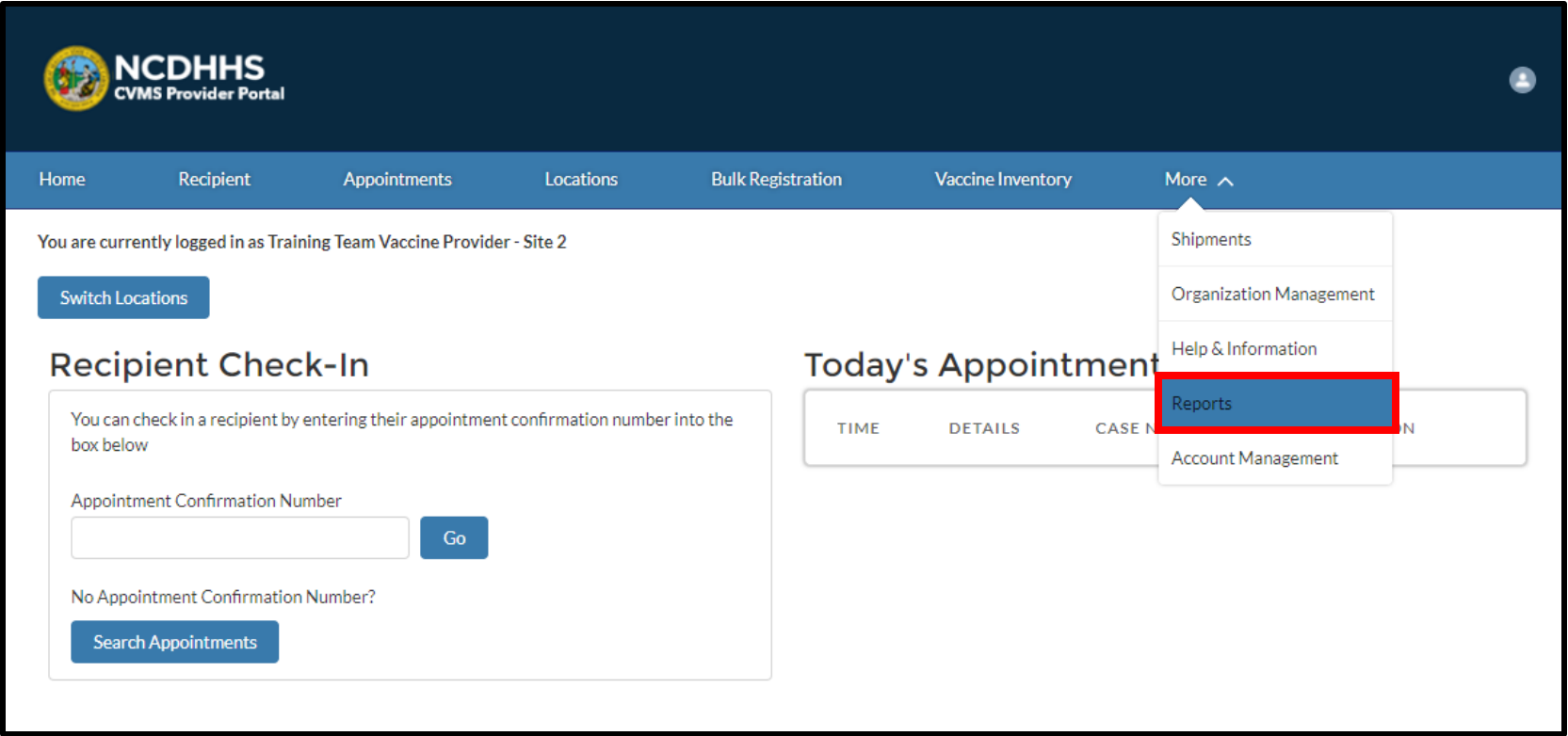
Day	Opening hours	Time window duration (mins)	Appointments per time window
<input type="checkbox"/> MON	Unavailable		
<input type="checkbox"/> TUE	Unavailable		
<input type="checkbox"/> WED	Unavailable		

Review Number of Appointments Booked and Remaining Quantity

Step 1 of 3: Navigate to Reports

Once you published your first schedule and received your first appointments, you will need to regularly update the number of 1st Dose appointments released in the system. A report is provided to you to aid you in releasing additional appointments.

- 1. Click on the **REPORTS** tab



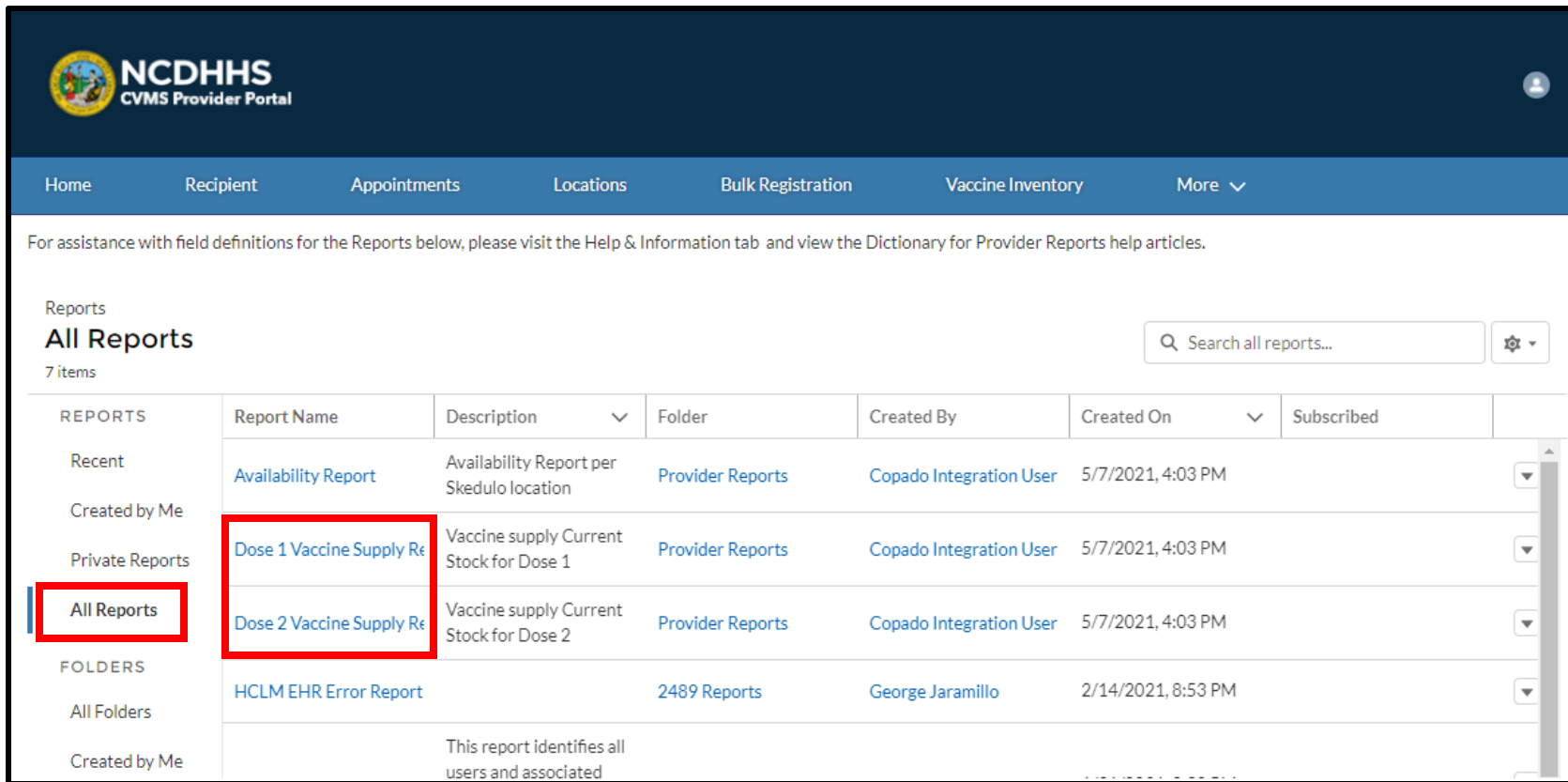
Audience

Healthcare
Location Manager

Step 2 of 3: Open Vaccine Supply Report

The **DOSE 1 VACCINE SUPPLY REPORT** and **DOSE 2 VACCINE SUPPLY REPORT** are found in the All Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

1. Click on the **ALL REPORTS** folder
2. Click on the **DOSE 1 VACCINE SUPPLY REPORT** or **DOSE 2 VACCINE SUPPLY REPORT**



The screenshot shows the NCDHHS CVMS Provider Portal interface. The top navigation bar includes links for Home, Recipient, Appointments, Locations, Bulk Registration, Vaccine Inventory, and a More dropdown. Below the navigation bar, a message states: "For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles." The main content area is titled "Reports" and "All Reports" with a search bar and a settings icon. A table lists reports with columns: REPORTS, Report Name, Description, Folder, Created By, Created On, and Subscribed. The table contains four items: "Availability Report", "Dose 1 Vaccine Supply Report", "Dose 2 Vaccine Supply Report", and "HCLM EHR Error Report". The "All Reports" folder is highlighted in the left sidebar, and the "Dose 1 Vaccine Supply Report" and "Dose 2 Vaccine Supply Report" rows are highlighted with red boxes.

REPORTS	Report Name	Description	Folder	Created By	Created On	Subscribed
Recent	Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Created by Me	Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Private Reports	Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
All Reports	HCLM EHR Error Report		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM	

Created by Me

This report identifies all users and associated

Audience

Healthcare
Location Manager

Tips

You will not need to maintain the 2nd Dose Vaccine Supply record once created if you make the Current Stock very large.


Step 3 of 3: Review Vaccine Supply Report

The **VACCINE SUPPLY REPORTS** show you the Current Stock as the location, the number of appointments (jobs) for the relevant dose, and the number of additional appointments that can be booked (remaining quantity). If the **REMAINING QUANTITY** is larger than 0, recipients will be able to book an appointment at this location if there is an available appointment slot. If this number is 0 or less, you must increase the current the Current Stock so that the Remaining Quantity is larger than 0 before additional recipients can book appointments.

- 1. Review the **REMAINING QUANTITY** and determine how many additional appointments to release
- 2. Click on the location name hyperlink

Audience

Healthcare
Location Manager



Home

Recipient


Appointments

Locations

Bulk Registration

Vaccine Inventory

More



Report: Jobs with Location
Dose 1 Vaccine Supply Report
Vaccine supply Current Stock for Dose 1

Search

Add Chart

Filter

Refresh

Export

Total Location: Current Stock value...

Cumulative nb of jobs for dose 1

Remaining quantity (Dose 1 only)

3

2

1

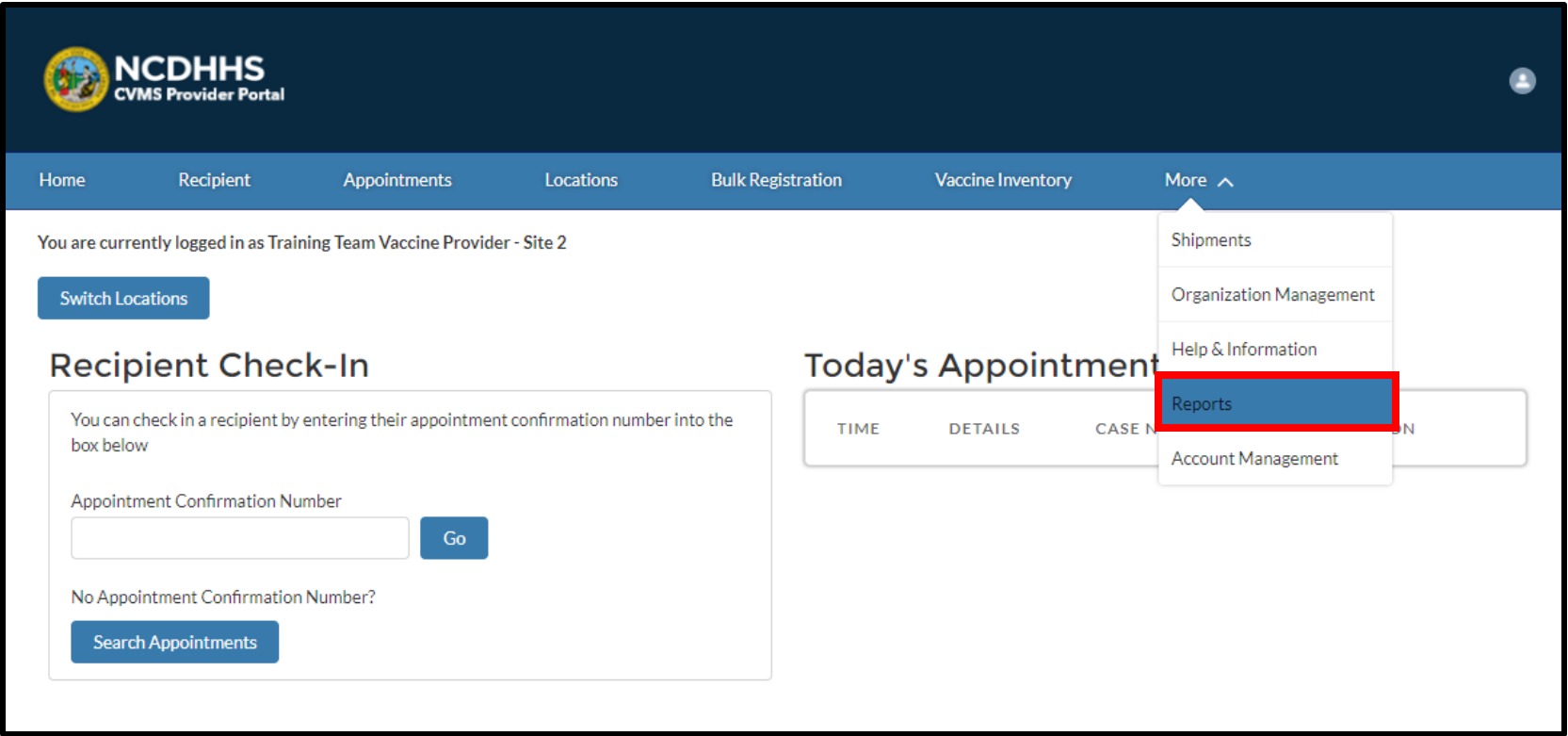
<input type="checkbox"/> Location: Location Name ↑	Sum of Location: Current Stock value (Dose 1 only)	Σ Cumulative nb of jobs for dose 1	Σ Remaining quantity (Dose 1 only)
<input type="checkbox"/> Kevin's Pharmacy	3	2	1
Total	3	2	1

Review Availability Report

Step 1 of 3: Navigate to Reports

If you wish to review your location’s schedule availability for the next 7 days, the **AVAILABILITY REPORT** will show you the number of appointment slots, booked appointments, and remaining appointments.

- 1. Click on the **REPORTS** tab



Audience

Healthcare
Location Manager


Step 2 of 3: Open Availability Report

The **AVAILABILITY REPORT** is found in the All Reports folder. Here, you will view all the reports available to Healthcare Location Managers.

- 1. Click on the **ALL REPORTS** folder
- 2. Click on the **AVAILABILITY REPORT**

Audience

Healthcare
Location Manager



Home

Recipient

Appointments

Locations

Bulk Registration

Vaccine Inventory

More

For assistance with field definitions for the Reports below, please visit the Help & Information tab and view the Dictionary for Provider Reports help articles.

Reports

All Reports

7 items

REPORTS

Recent

Created by Me

Private Reports


All Reports

FOLDERS

All Folders

Created by Me

Report Name	Description	Folder	Created By	Created On	Subscribed
Availability Report	Availability Report per Skedulo location	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Dose 1 Vaccine Supply Report	Vaccine supply Current Stock for Dose 1	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
Dose 2 Vaccine Supply Report	Vaccine supply Current Stock for Dose 2	Provider Reports	Copado Integration User	5/7/2021, 4:03 PM	
HCLM EHR Error Report		2489 Reports	George Jaramillo	2/14/2021, 8:53 PM	
	This report identifies all users and associated				



NC DEPARTMENT OF
HEALTH AND
HUMAN SERVICES

53

Step 3 of 3: Review Schedule Availability for the Next 7 Days

HomeRecipientAppointmentsLocationsBulk RegistrationVaccine InventoryMore

Report: Day Reports with Location

Availability Report

Availability Report per Skedulo location

Search

Add Chart

Filter

Refresh

Export

Number of Appointment slots per ...

Number of slots booked for a Dos...

Number of slots booked for a Dos...

Remaining Quantity of slots

240

0

0

240

<input type="checkbox"/> Location: Location Name ↑	<input type="checkbox"/> Date ↑	<input type="checkbox"/> Number of Appointment slots per day	<input type="checkbox"/> Number of slots booked for a Dose 1	<input type="checkbox"/> Number of slots booked for a Dose 2	<input type="checkbox"/> Remaining Quantity of slots
<input type="checkbox"/> Training Team Vaccine Provider - Site 1	5/17/2021	96	0	0	96
	5/18/2021	144	0	0	144
Total		240	0	0	240

Audience

Healthcare
Location Manager

Tips

The Availability Report is updated once daily.

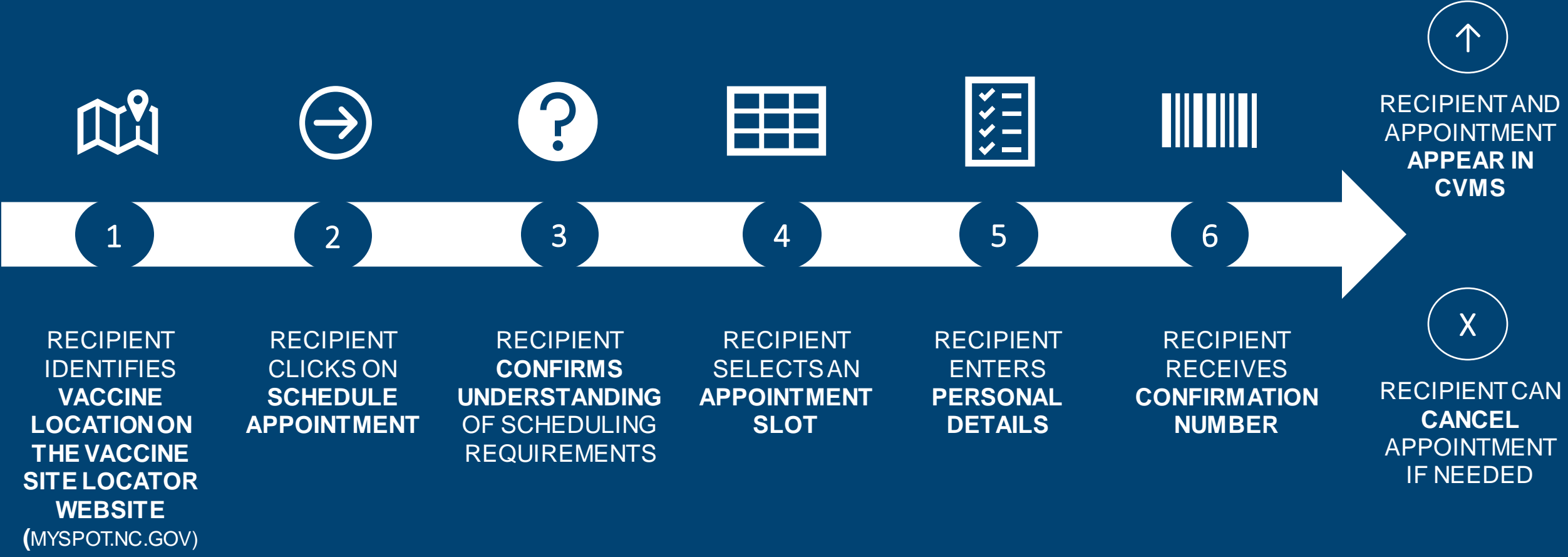
- The **AVAILABILITY REPORT** shows the number of appointment slots as defined by the location’s availability and the number of appointment slots booked for first and second-dose appointments.
- The availability schedule is shared by first and second-dose appointments.
- Lastly, review the remaining quantity of appointment slots.

You may find that you need to increase availability to allow additional appointments to be booked. See the *Set Weekly Location Schedule for Dose 1 and Dose 2 appointments* section for more information on editing the default availability schedule. See the *Create Non-Regular Availability* section for more information on editing the availability schedule for temporarily editing the availability schedule..

Scheduling from the Perspective of a Recipient

Scheduling from the Perspective of a Recipient





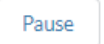
Below are the various activities included in the appointment scheduling process from the perspective of a Recipient.



Appendix

Additional Notes

Key Items:

- **Hyperlinks** appear as light blue and will provide additional information or navigation.
- *** Asterisks** are used to denote required information.
-  A Toggle can be clicked to see selectable options.
-  A Pen can be clicked to make edits to the field.
-   Navigation Buttons can be clicked on to progress to the “next” or the “previous” step in a task.
-  A Pause button can be clicked if you wish to step away / and return to your form later. You will be prompted to review your previously entered data upon your return/ login.

Contact Information:

- All questions should be directed to the CVMS Help Desk Portal at https://ncgov.servicenow.services.com/csm_vaccine.

Supported Web Browsers:

- Please use the latest version of Chrome, Firefox, Safari, or Edge Chromium browsers to access CVMS.
- For more information on supported browsers, see https://help.salesforce.com/articleView?id=getstart_browsers_sfx.htm&type=5
- Note: Internet Explorer and Edge (non-Chromium) browsers are not supported.

User Guide Change Log

Version	Date of Change	Changes Made	Impacted Slides	Author
1	03/12/2021	<ul style="list-style-type: none">Initial document		Kevin Kauffman, Kechia Scott, Kristin Clark
2	03/25/2021	<ul style="list-style-type: none">Added tip about Display Vaccine Site Locator field	16	Kristin Clark
3	04/01/2021	<ul style="list-style-type: none">Replaced screen shots to reflect Vaccine Brand field	1, 15,16	Kristin Clark
4	04/06/2021	<ul style="list-style-type: none">Updated Recipient Scheduling process	41	Tabitha McKelvy
5	04/16/2021	<ul style="list-style-type: none">Added updated enable scheduling processUpdated Display on Vaccine Site Locator to dropdownAdded guidance for Location Setting field on location recordUpdated guidance on non-regular closures	10,11,12,13,14,18,19,35	Kevin Kauffman
6	05/14/2021	<ul style="list-style-type: none">Added non-regular schedule availability supportIncluded scheduling reports	18,19, 27 – 49	Kevin Kauffman